NTT DATA

NTT DATA ServiceNow Insights and Vision Report 2026/27

What 350+ IT leaders say about scaling AI on enterprise service management platforms

Get started

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Executive summary

The ambition to scale AI across enterprise service management is real. The infrastructure beneath it isn't ready

This report draws on responses from more than 350 IT leaders to map where enterprise AI is stalling in service management contexts, why it is stalling, and what is required to close the gap. The findings are organised around five interconnected imperatives - each one a precondition for the next.

Fix the foundation

59% of organizations report AI stuck in pilots or siloed deployments. Infrastructure debt is the first barrier.

Build the financial case

47% describe their demonstrated AI return as anecdotal. CFO-grade measurement must be built in from day one.

Redesign broken processes

37% cite manual routing delays as the top cross-departmental problem. AI cannot fix a structurally broken workflow.

Invest in people

52% say change management is their most needed partner capability - ahead of technical implementation.

Define the control point

Only 13% use AI to trigger cross-functional actions autonomously. Governance gaps are widening.

Executive summary

About this research

350+ IT decision-makers.

One question: ***is your organization ready to scale AI to improve enterprise service management?***

The 2026 NTT DATA ServiceNow Insights and Vision Report surveyed a total of 353 IT and business leaders across five countries and six industries. All held direct authority over enterprise service management strategy, AI investment, or platform decisions. The findings reflect the priorities and judgements of those with budget accountability and board-level visibility.

The research is designed to map the real-world distance between where organizations want to be with AI in service management and where their current infrastructure, processes, governance, and workforces will actually take them.

350+
IT Leaders surveyed

5
Imperatives identified

C-suite & Directors
Seniority of respondents

Multi-sector
Coverage across major verticals

Fix the foundation before you scale the capability

The gap between AI ambition and AI readiness in service management is where ROI is currently being lost.

Before scaling capability, organizations must address the infrastructure challenges that are silently undermining AI investment.

Fix the foundation before you scale the capability

Key points

AI is exposing the inefficiencies with fragmented work.

Enterprise service management has a role to play in giving AI the workflows, governance and operational structure needed to scale.

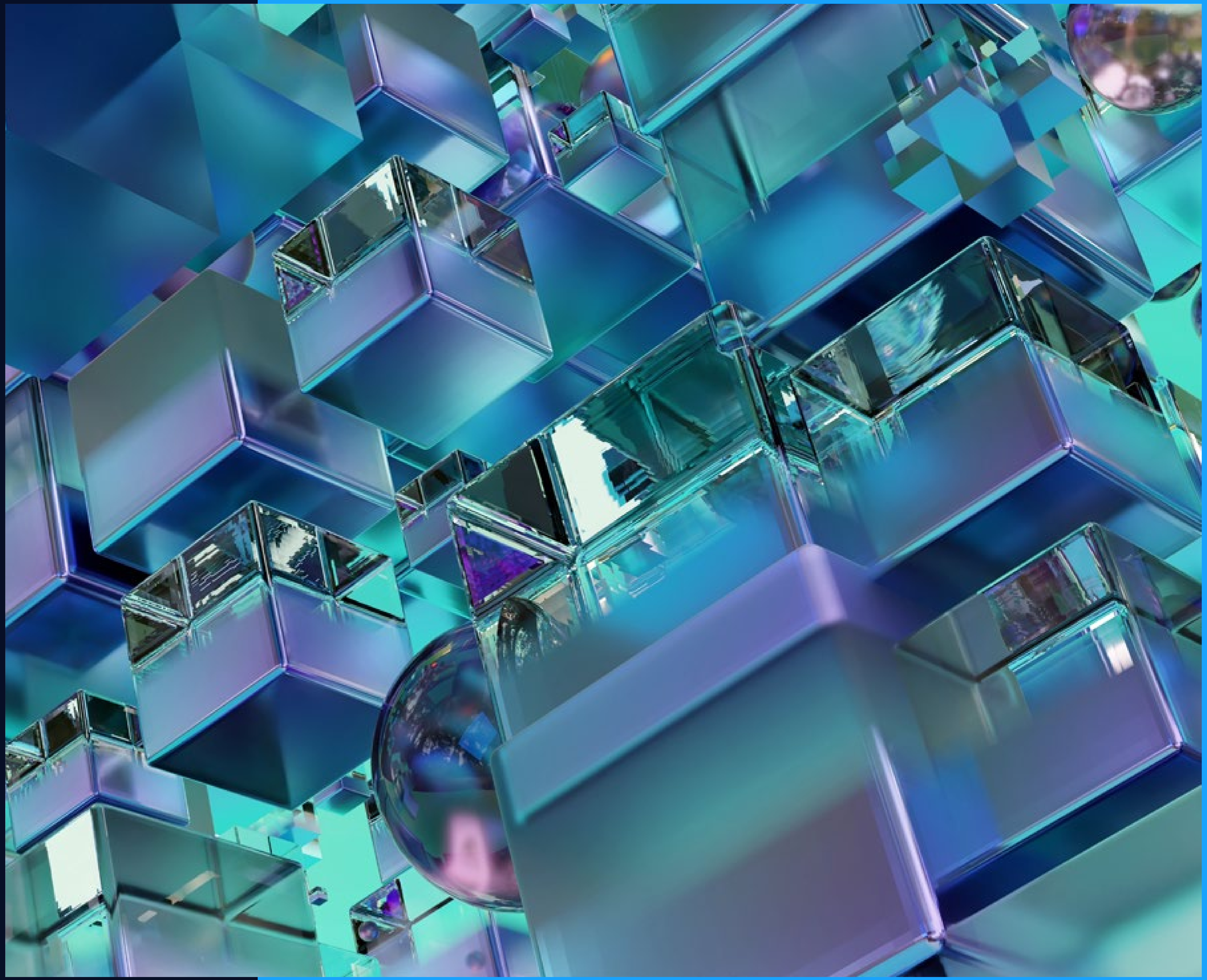
Siloed AI will only take businesses so far.

The bigger opportunity is to use service management as the operating layer that connects work, data, teams and automation across the enterprise.

AI pilots are common but proving hard to operationalize.

That is where service management becomes critical: turning scattered activity into governed, repeatable and measurable work.

In enterprise service management, data quality and process simplification are becoming major drivers of AI investment.



Fix the foundation before you scale the capability

The AI readiness gap

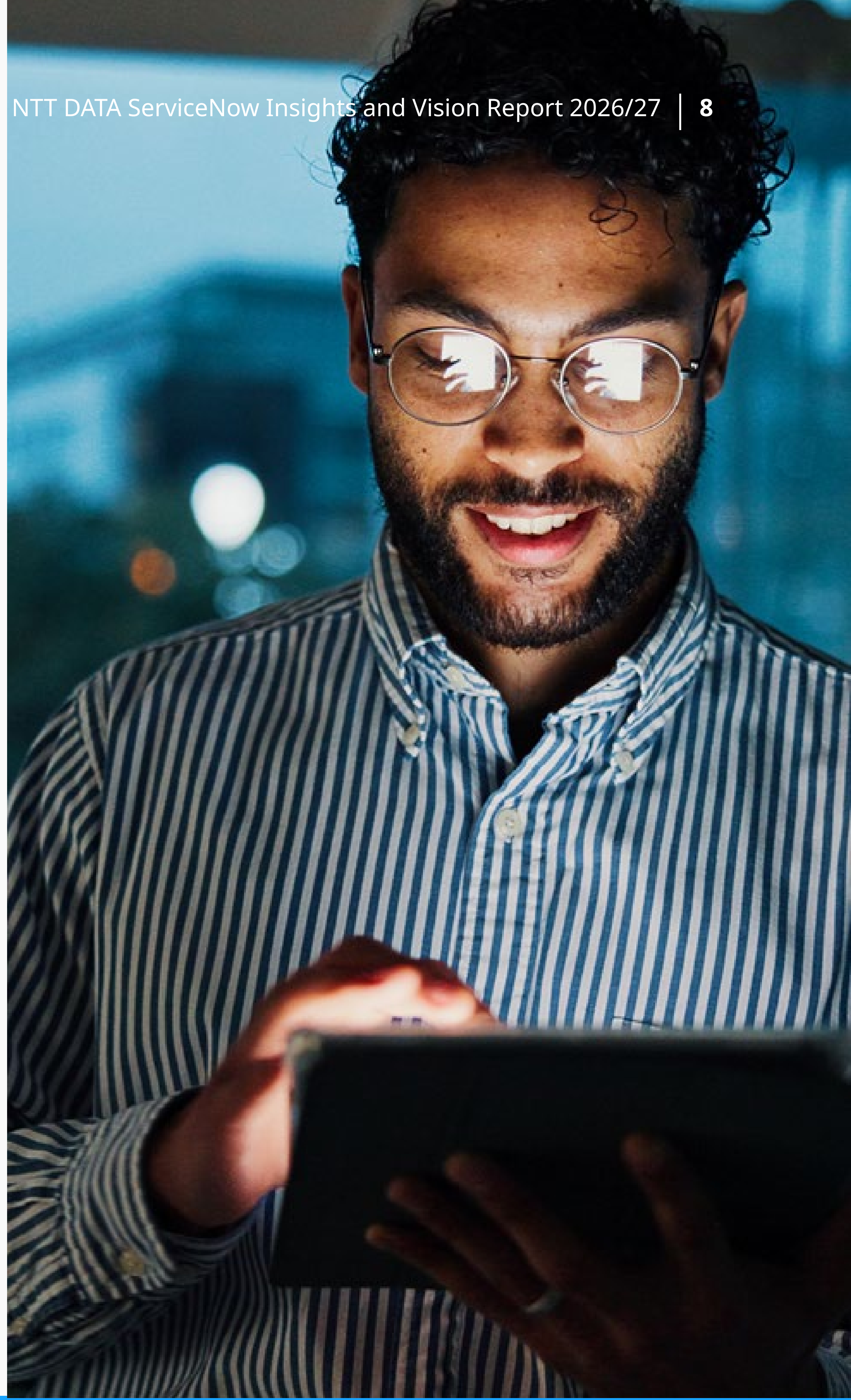
Nearly six in ten organizations report AI is either stuck in small departmental pilots or deployed in siloed functions - not unified. The infrastructure beneath the ambition is not ready.

59% say AI is stuck in small pilots or deployed in specific functions but not unified

31% say scaling AI in their current environment would be 'difficult'

28% say scaling AI would require a major service management system and process redesign

Source: Omdia | N=353



What this means: These figures point to a market that is confident about AI transformation, but less certain in the operating foundations that need to carry the load. The organizations starting to break this pattern are investing in the workflows, governance, service processes and infrastructure AI needs to scale.

Fix the foundation before you scale the capability

Outdated technology foundations are both a maintenance issue and strategic AI risk

The challenge

Organizations layering new AI capability onto dated infrastructure are making the same bet: that the foundations will catch up later. The evidence suggests that bet is starting to fail.

Nearly three in ten organizations recognize that major redesign will be needed before their AI ambitions scale properly. Yet investment continues, creating expensive stagnation that is being dressed up as transformation.

AI agents need clean data, connected systems and coherent service processes to function reliably. Without that operational foundation, outputs become unreliable, adoption slows, and ROI conversations become much harder.

The focus

Treat the groundwork as part of the AI investment. Clean data, connected systems and clear ownership need to come before scale.

Map the work before automating it. Weak process design can lead to expensive risks.

Use AI as a lever for software rationalization, especially to reduce license counts and remove underused tools.

Use enterprise service management as the operating layer. It gives AI the workflows, controls and measurement needed to move beyond pilots.

Don’t expect AI to work around broken processes

Fragmentation and legacy processes are impacting AI value realization. Layering AI over broken workflows does not make them intelligent - it makes them unreliable and inefficient.

Don't expect AI to work around broken processes

Key points

Legacy, fragmented systems create slow-down.

AI and human support agents need connected data, clear ownership and processes that work across departments.

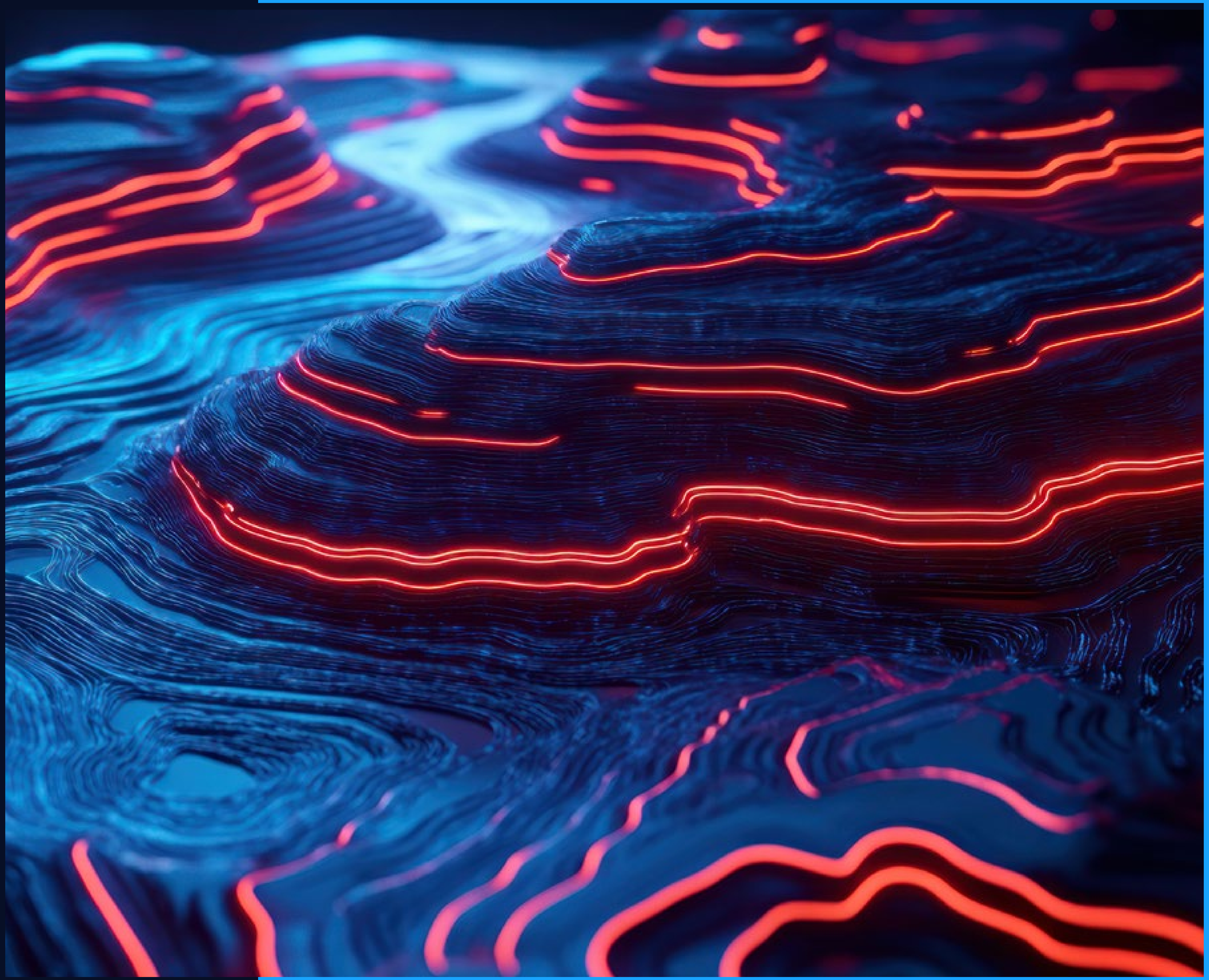
AI value often disappears when work crosses teams.

Enterprise service management can help create the structure needed to act reliably.

Manual routing will limit AI scale.

If work still depends on people stitching systems and processes together, then AI agents will inherit the same friction.

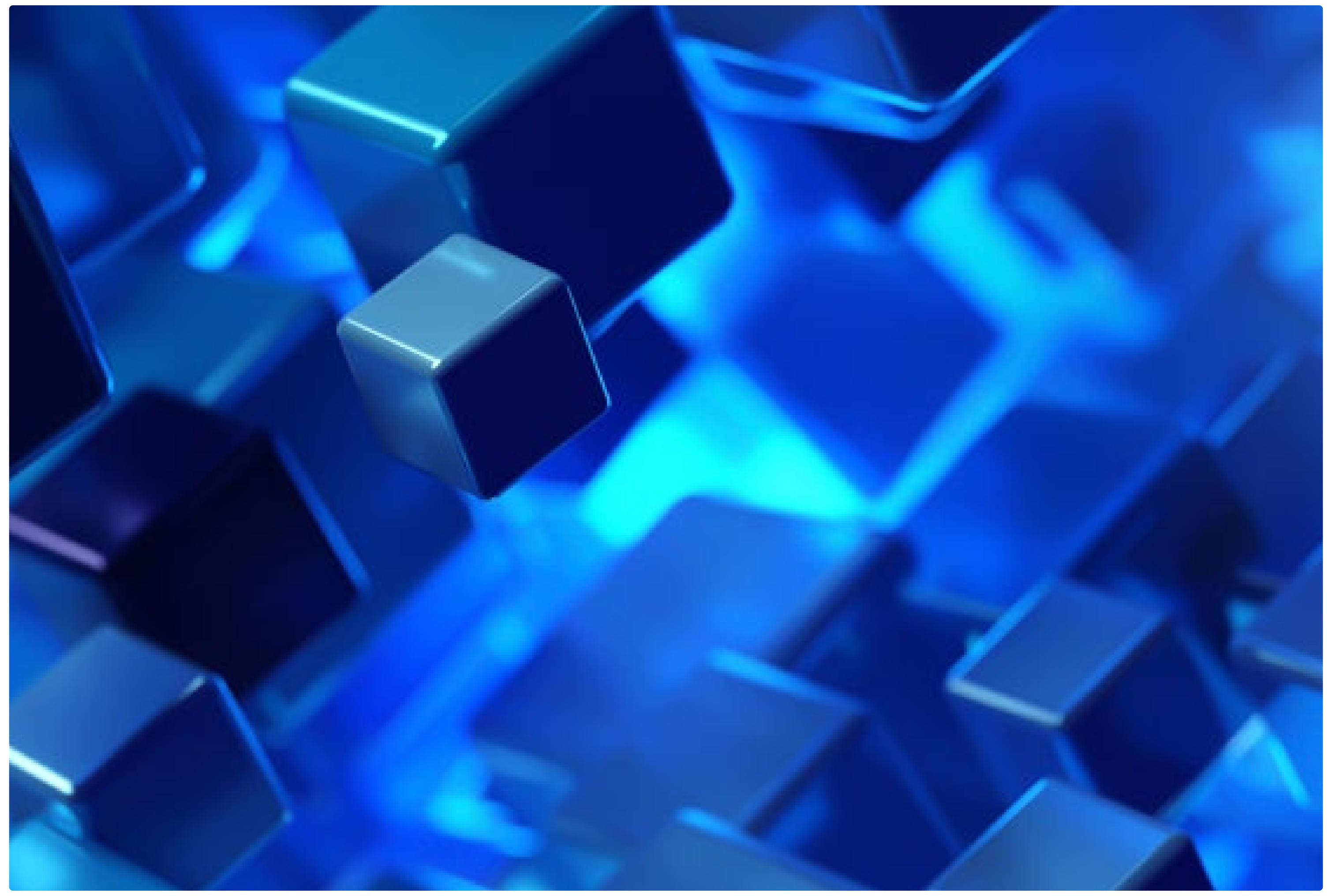
In enterprise service management, data quality and process simplification are becoming major drivers of AI investment.



Don’t expect AI to work around broken processes

Where fragmentation is inhibiting AI value

31% of leaders cite poor or inconsistent data quality as the single biggest barrier to business-wide AI impact - but broken data is only part of the picture.



Common barriers to business-wide AI impact include:

37%

Manual approvals and routing delays

Manual approval chains remain the biggest cross-departmental blocker. If AI-generated work still queues in human workflows, the speed advantage disappears.

31%

Lack of visibility into work status

AI cannot orchestrate work it can’t see. Visibility into task status, ownership and handoffs becomes critical to scale.

31%

Inconsistent data across systems

Agents are only as strong as the data environment underpinning them. If data is partial, duplicated or conflicting - outputs become harder to trust.

Resolve the control point question before shadow AI resolves it for you

As AI use grows across business units, gaps in ownership, access, data use and oversight will widen.

Organizations that establish clear decision rights, guardrails and monitoring now can shape adoption on their own terms. Those that wait risk inheriting fragmented practices and unmanaged exposure.

Resolve the control point question before shadow AI resolves it for you

Key points

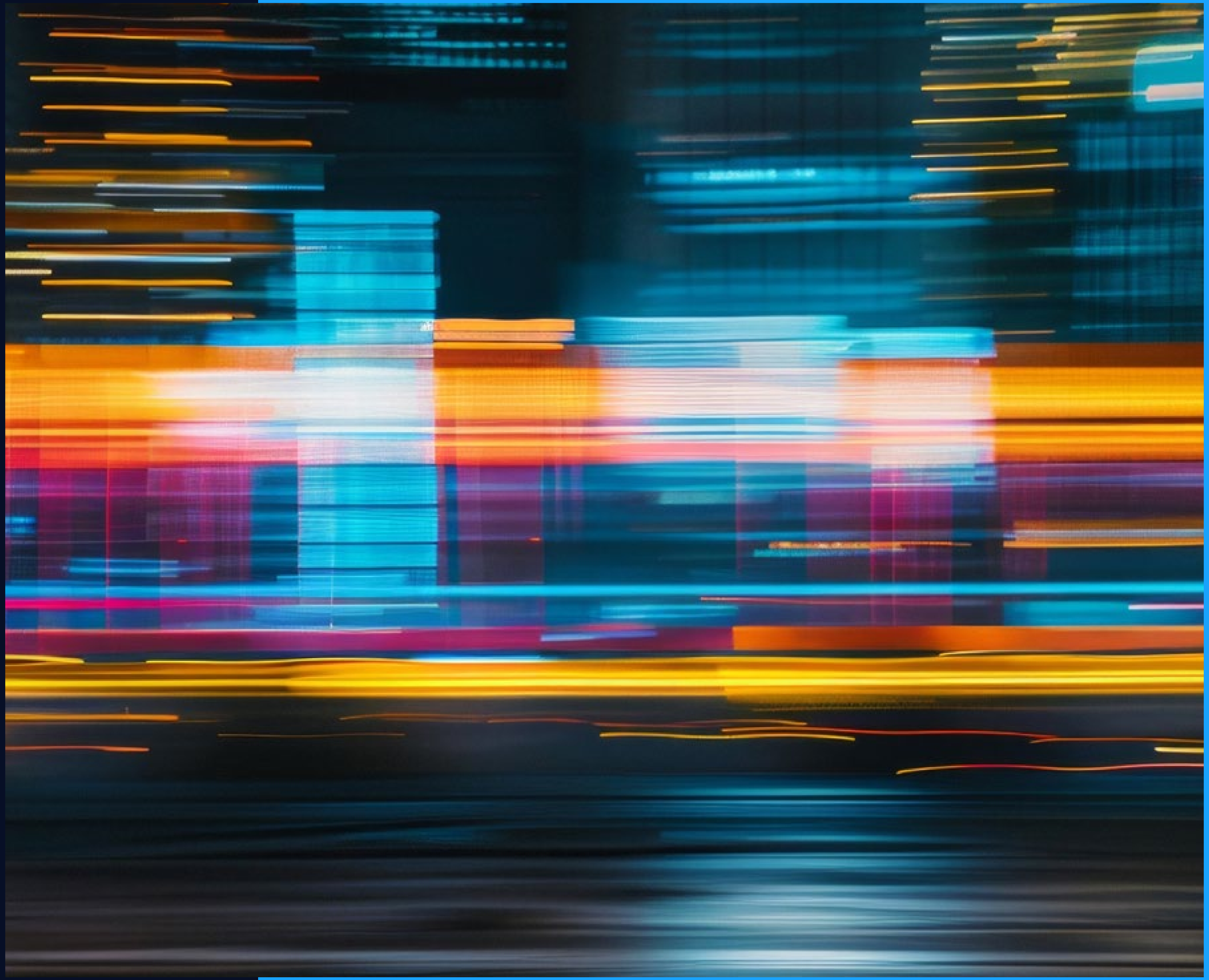
Security and risk policies can be set centrally, but control is won or lost in the workflows, approvals, integrations and service processes that decide what AI can actually do.

This is the governance priority.

A priority should be to define AI governance points before shadow AI fills the gap.

Without this governance, user workarounds and disconnected departmental decisions will remain common.

Enterprise service management becomes strategically important as it provides a way to embed AI governance into the flow of work, rather than leaving it as something abstract.



Resolve the control point question before shadow AI resolves it for you

Strong governance is the foundation for enterprise AI at scale

Only 13% of organizations currently use AI to execute cross-functional workflow actions autonomously. That is the real proof point between AI experimentation and AI-led transformation at scale.

34%

Investing in a standardized enterprise workflow platform as primary AI orchestration layer

27%

Pursuing a federated model across multiple vendors - intuitive appeal, poor track record

13%

Currently use AI to trigger and execute cross-functional actions autonomously

What the 13% indicates: The mature organizations are moving past pilots and are advancing on the centralized AI operating model and approach. Investment in a centralized platform like ServiceNow that coordinates work and where human control remains necessary is vital.

Resolve the control point question before shadow AI resolves it for you

AI scale needs guardrails, whether control is centralized or federated

34% want a standardized AI platform model

What this means?
A single enterprise service management platform becomes the main orchestration layer. AI agents, workflow triggers and cross-functional actions run through one control point.

Key considerations:

1. Can one platform see enough of the work to orchestrate it properly?
2. Are policy, identity and access controls enforced at the platform layer?
3. Can integrations be reused across workflows rather than rebuilt each time?
4. Can leaders track AI actions, handoffs and outcomes in one place?
5. Is ownership clear when agents trigger work across functions?

27% want a federated multi-vendor model

What this means?
Multiple AI tools and vendor platforms operate in parallel, with each managing its own domain. This gives organizations flexibility, but makes control harder when work crosses systems and teams.

Key considerations:

1. Can governance rules follow work across vendor platforms?
2. Is identity and access management consistent across the full environment?
3. Can leaders see what AI agents are doing at the edges of the business?
4. Are there clear rules for which system takes priority?
5. Can outcomes be measured across the full workflow?

Build the financial case for AI from day one, not in retrospect

47% of leaders describe demonstrated AI return as anecdotal.

The organizations that will get the most value from AI investment will be the ones that measure it in terms a CFO will fund - built in from the start, not assembled after the fact.

Build the financial case for AI from day one, not in retrospect

Key points

Enterprise service management can help link AI investments to things like costs removed, tools retired, faster service, lower risk and measurable productivity gains.

Legacy tech consolidation may be the clearest AI investment case because duplicated tools, fragmented platforms and manual service processes create savings the CFO can recognise quickly.

Businesses using board-level metrics are setting the maturity benchmark by better measuring AI value and ROI.

Those businesses lacking this measurement maturity will continue to lag behind.

Measurement models must be built into AI rollouts from the start, ideally with a baseline, target outcome, and owner.

This should not be an afterthought.

Build the financial case for AI from day one, not in retrospect

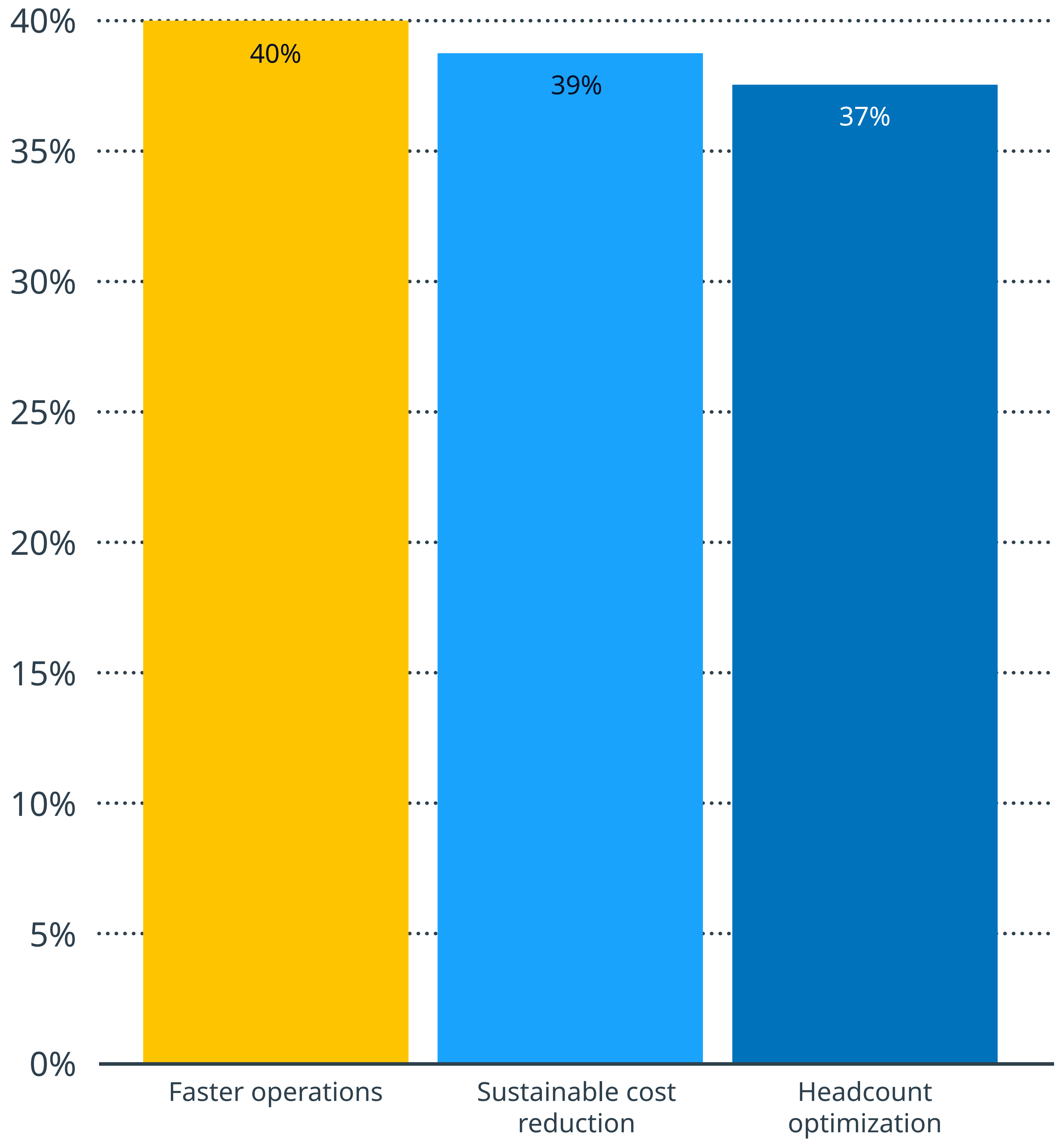
What businesses want vs. what they can demonstrate

Leaders are clear on what they want from AI. They struggle to demonstrate what is being delivered.

The consolidation argument survives CFO scrutiny

The strongest AI business case may start with better integrating and rationalizing the tools already costing the business money. Consolidating legacy platforms can reduce licence spend, cut integration overhead and make AI easier to govern at scale.

Top 3 desired AI outcomes



Source: Omdia | N=353

What organizations are currently experiencing

13% have board-level financial metrics demonstrating AI value

47% describe their demonstrated return as anecdotal or unclear

Invest in your workforce as seriously as you invest in your platforms

Having addressed infrastructure, fragmentation, architecture, and measurement, the most urgent remaining imperative is not technical. It is human.

The technology, in most cases, is ready.
The workforce is not.

Invest in your workforce as seriously as you invest in your platforms

Key points

AI value depends on people understanding new ways of working, trusting it enough to use it, and having the confidence to adapt their roles around it.

Address trust and education early to reduce resistance.

Privacy, security and accuracy concerns need addressing once AI starts touching real workflows, employee data and business decisions.

Leaders need to define where people approve actions, review exceptions, challenge outputs and remain accountable when AI agents move work across the business.

Training, role redesign, communication and confidence-building need funding alongside the tech, because adoption will decide how much value the technology actually delivers.

Invest in your workforce as seriously as you invest in your platforms

Technical deployment isn't the hard part

When asked what capability they most need from a strategic AI and enterprise service management partner, leaders ranked change management ahead of every technical capability.

52% cite organizational change and adoption management as the most needed partner capability

38% cite accelerated technical implementation - second to change management by a significant margin

Top AI risks

36%
Data privacy violations
The leading concern - requiring governance frameworks, not just code.

35%
Security exposure
AI integrations create new attack surfaces that security architecture must address.

34%
Inaccurate AI outputs influencing decisions
Human-in-the-loop controls are essential, not optional.

Source: Omdia | N=353

Conclusion: Five problems, one AI agenda

The findings in this report are connected. Infrastructure, workflow architecture, AI governance, value measurement and workforce investment each create the conditions for the next stage of AI maturity. The organizations that pull ahead will be also focused on the underlying operational work like fixing foundations, redesigning service processes, settling governance questions, proving value in financial terms and building employee confidence around AI-led work.

This is where enterprise service management becomes important. It gives organizations a way to connect workflows, ownership, governance, measurement and employee experience around how work actually gets delivered.

Conclusion: Five problems, one AI agenda

Key takeaways

Fix the foundations before scaling AI

AI built on fragmented data, legacy systems and disconnected processes will underperform, regardless of model quality.

Define AI governance before shadow AI fills the gap

Governance can't remain open while AI spreads across teams. Leaders need clear control points for orchestration, agent permissions, approvals, audit trails and accountability.

Fund workforce readiness as part of delivery

Change management, training and employee confidence need funding alongside any platform investment. AI only delivers when people trust the outputs, know when to intervene and understand how roles may change.

Build measurement models on day one

Tools retired, licences reduced, workflows simplified and manual effort removed via AI all provide measure a CFO will love. Use that savings case to anchor the wider AI investment story.

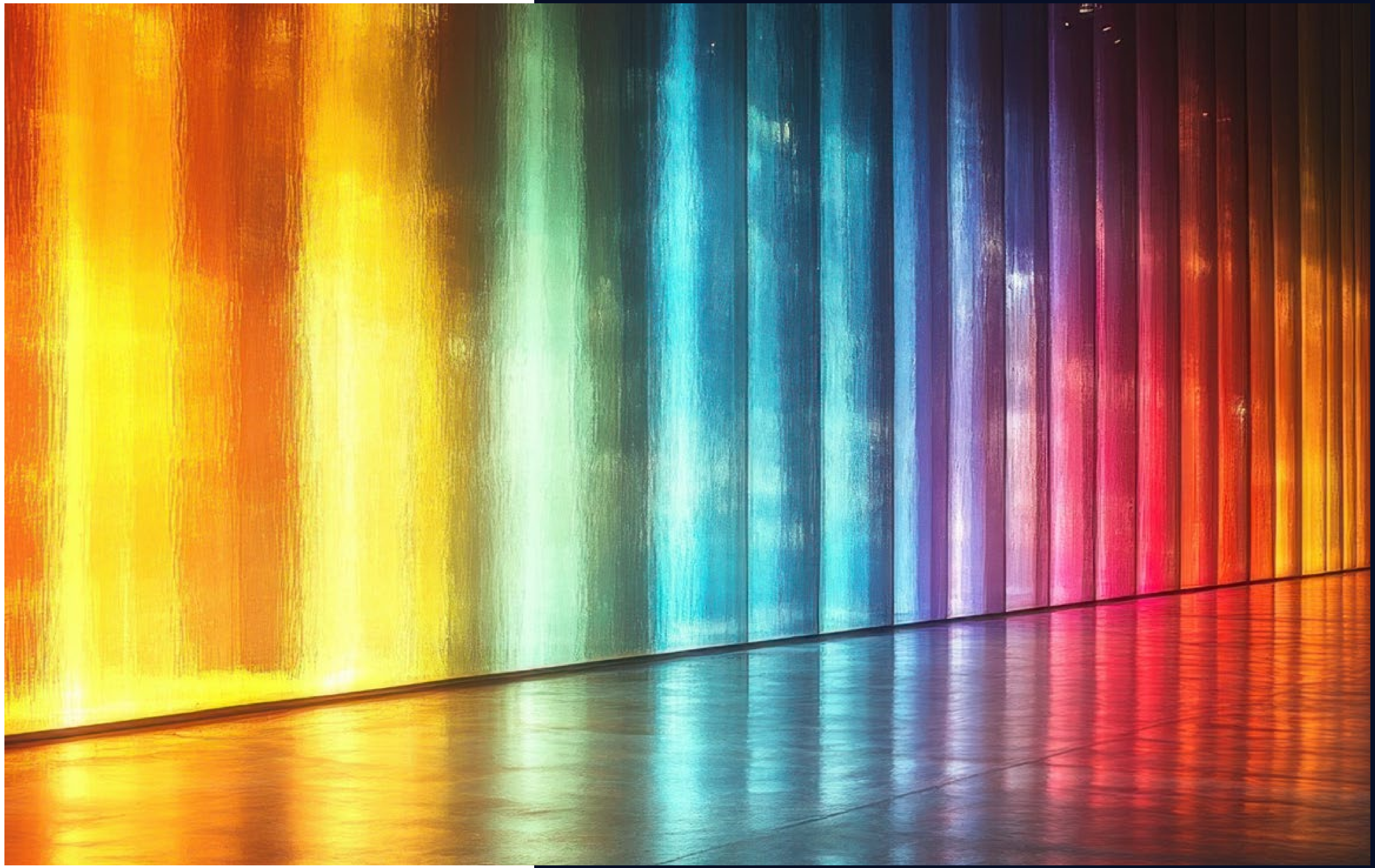
Redesign service processes before deploying agents

Agents will inherit the workflows they are developed on, so manual routing and inconsistent data will limit AI performance unless processes are redesigned around cross-functional delivery.

Appendix

Appendix

Final note



This report is commissioned by NTT DATA. NTT DATA is a global technology services and consulting leader, helping organisations across every major industry accelerate digital transformation through AI, cloud, and intelligent automation. As a ServiceNow Elite partner, NTT DATA brings deep platform expertise and end-to-end delivery capability to complex, large-scale service management programs.

Omdia thanks NTT DATA for making this possible and emphasizes the independence of its conclusions.

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Appendix

Survey respondent profile

Who we surveyed?

353 IT and business leaders participated in the NTT DATA 2026 Service Management Insights and Vision Survey. All respondents are verified ServiceNow users with direct influence over, or final authority on, service management and workflow platform decisions at their organisation.

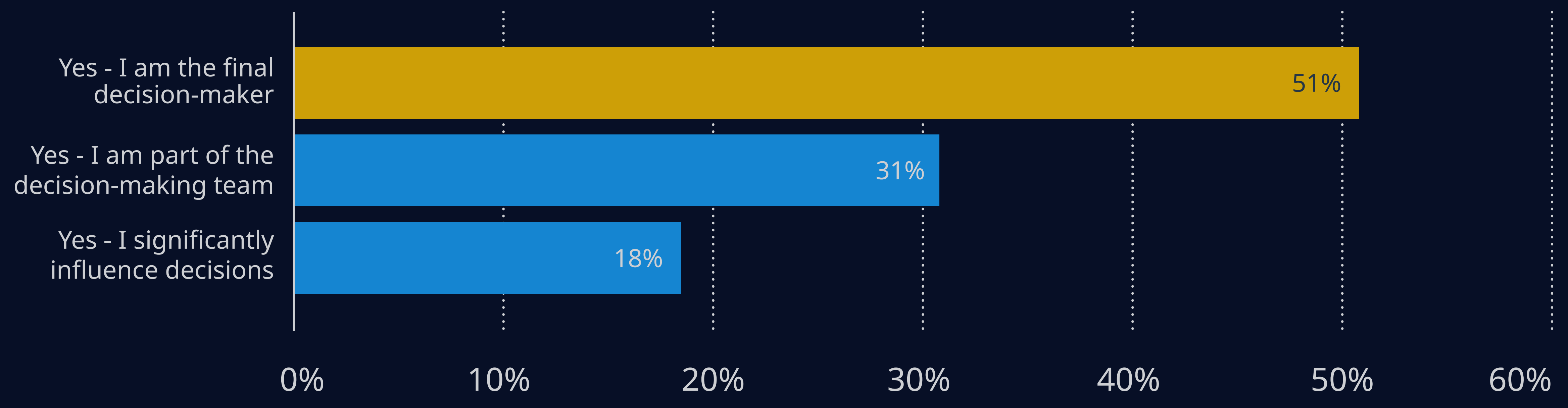
353
Total respondents

100%
Verified ServiceNow decision-makers

5
Countries

Decision-making authority

Does your organization currently use ServiceNow, and what is your role in decisions regarding service management solutions?



51% are the sole final decision-maker on service management platform decisions.

49% The remaining 49% hold significant influence - as part of the decision team (31%) or as key influencers (18%). Every respondent has direct, verified authority over their organization's service management choices.

Source: Omdia | N=353

Appendix

Geography

Near-equal representation across five markets - designed to give the findings global relevance without any single geography dominating the results.

Country	
Brazil	20%
Germany	20%
Spain	20%
United Kingdom	20%
United States	20%

Source: Omdia | N=353

Organization size

Enterprise-weighted sample

The sample skews toward large and very large enterprises - the organizations most likely to be running complex, multi-department ServiceNow deployments. Findings are therefore most directly applicable to enterprise-scale transformation programmes.

Business size	
1,000 to 4,999 employees	18%
5,000 to 9,999 employees	29%
10,000 to 19,999 employees	29%
More than 20,000 employees	24%

Source: Omdia | N=353

Appendix

Annual revenue

Large enterprise context

Nearly two-thirds of respondents come from organizations with annual revenues exceeding $5 billion. This positions the findings within a large enterprise context where platform complexity, multi-stakeholder governance, and AI investment scale are most acute.

64%
annual revenue of $5 billion or more

Revenues	
$500 million to $999 million	15%
$1 billion to $4.99 billion	33%
$5 billion to $9.99 billion	**31%**
$10 billion to $20 billion	**20%**
More than $20 billion	**13%**

Source: Omdia | N=353

Industry

Near-equal sampling across six industries - ensuring findings represent broad enterprise perspectives rather than any single sector dynamic.

Which best describes your organization's industry?	
Banking and Financial Services	18%
Life sciences and pharma	17%
Manufacturing	16%
Insurance	16%
Public sector	16%
Telcom, media and technology	16%

Source: Omdia | N=353

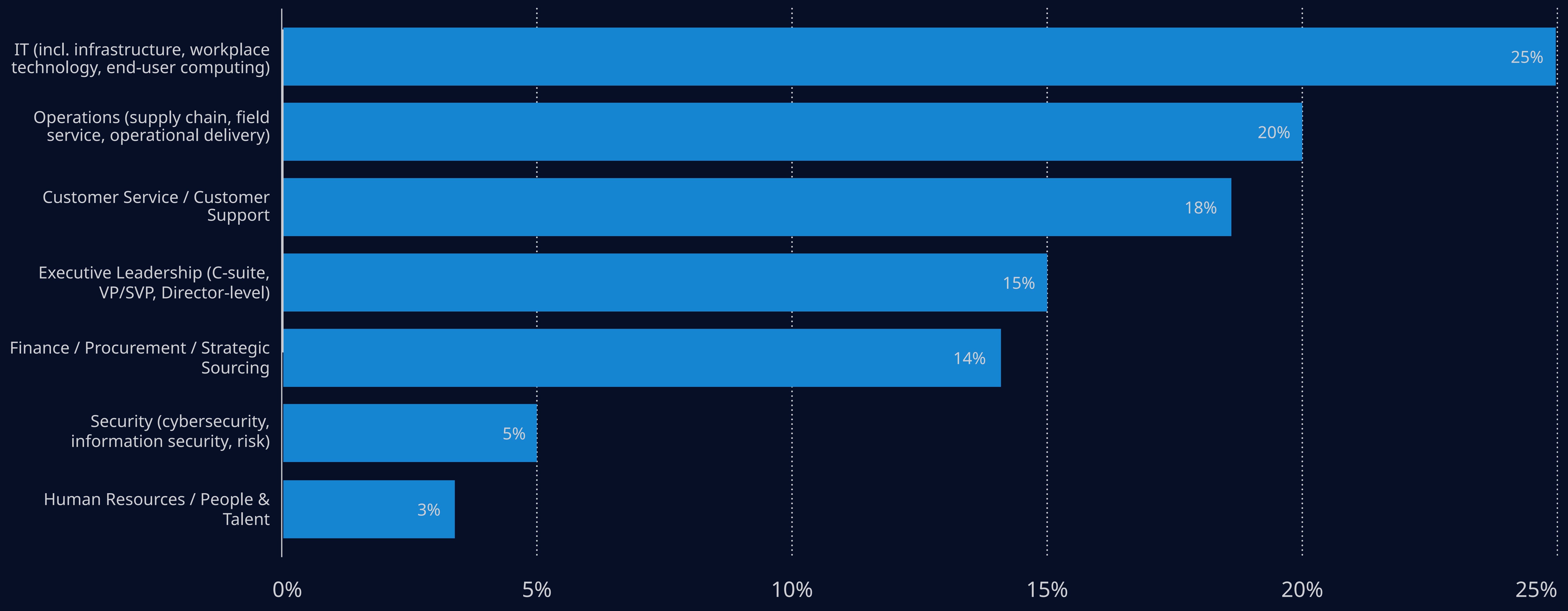
Appendix

Business department

IT leads, but not in isolation

IT is the largest department, but the majority of respondents come from outside the IT function - Operations, Customer Service, Executive Leadership, Finance, and Security combined account for nearly three-quarters of the sample.

This signals that service management is increasingly a cross-enterprise concern, not just an IT discipline.



Source: Omdia | N=353

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About Omdia

Omdia is a market-leading data, research and consulting business focused on helping digital service providers, technology companies and enterprise decision-makers thrive in the connected digital economy. Through our global base of analysts, we offer expert analysis and strategic insight across the IT, telecoms and media industries.

We create business advantage for our customers by providing actionable insight to support business planning, product development and go-to-market initiatives.

Our unique combination of authoritative data, market analysis and vertical industry expertise is designed to empower decision-making, helping our clients profit from new technologies and capitalize on evolving business models.

Omdia is part of Informa TechTarget, a B2B information services business serving the technology, media and telecoms sector. The Informa group is listed on the London Stock Exchange.

We hope that this analysis will help you make informed and imaginative business decisions. If you have further requirements, Omdia's consulting team may be able to help your company identify future trends and opportunities.

Appendix

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